EXECUTIVE STEERING COMMITTEE

December 14, 2022

ROLL CALL

FXProjects@ahca.myflorida.com

FX PROCUREMENT INTEGRITY STATEMENT

The Agency's FX Program is an ongoing process that involves the preparation of specifications for upcoming contracts. To protect the competitive nature of FX procurements, the Agency will not have any discussions related to the scope, evaluation, or negotiation of any current or future procurement with vendors or their representatives, other than the Agency's SEAS Vendor, IV&V Vendor and Integration Services/Integration Platform (IS/IP) Vendor, who are precluded from bidding on future FX contracts. Procurements are subject to s. 287.057(25), Florida Statutes, between the release of the solicitation and the end of the 72-hour period following the agency posting the notice of intended award.

OPENING REMARKS

Simone Marstiller, Secretary & FX Executive Sponsor

AGENDA

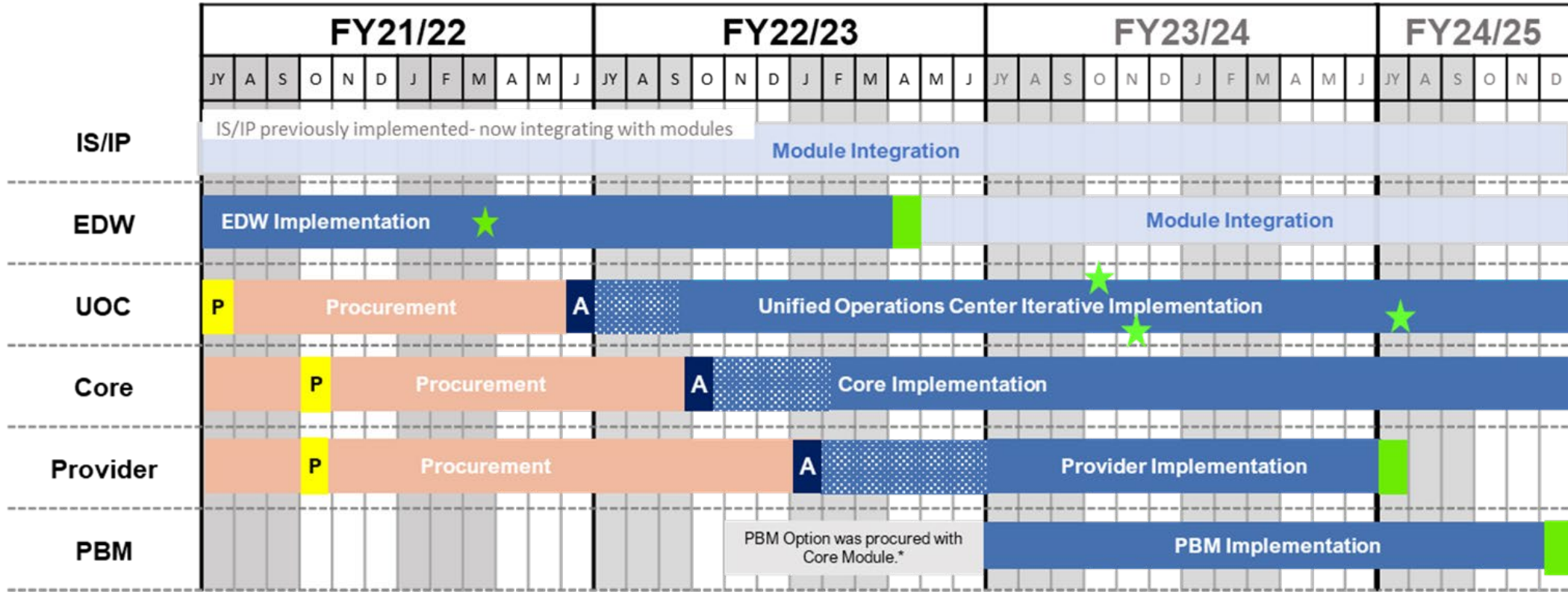| Topics	Speakers	Time
Opening Remarks	Simone Marstiller	10:00 – 10:05 a.m. (5 mins)
FX Program Updates	Mike Magnuson	10:05 – 10:10 a.m. (5 mins)
FX Interagency Subject Matter Experts (iSMEs) Updates	Alicia Dyer	10:10 – 10:15 a.m. (5 mins)
FX Module/Project Updates	FX Sponsors	10:15 – 10:25 a.m. (10 mins)
FX Focus: Unified Operations Center (UOC)	Derek Jackson	10:25 – 11:10 a.m. (45 mins)
FX Independent Verification & Validation (IV&V) Assessment	Kurt Hartmann	11:10 – 11:20 a.m. (10 mins)
Open Discussion/Member Updates	Mike Magnuson / ESC Members	11:20 – 11:25 a.m. (5 mins)
Closing Remarks	Simone Marstiller	11:25 – 11:30 a.m. (5 mins)

FX PROGRAM – SINCE LAST ESC

- CMS Approval on Implementation Advanced Planning Document Update – July 2022
- Unified Operations Center (UOC) Executed Contract – October 2022
  - Onboarding activities began October 20th and Automated Health Solutions (AHS) is fully engaged with FX
- Core Contract Awarded – October 2022
  - No official protest was received and contracting is underway with Gainwell Technologies
  - Pharmacy Benefits Module (PBM) – Optional under Core
- Provider (PSM) Procurement
  - In process
  - Vendor negotiations likely to occur over the next couple months

FX ROADMAP

FX SPEND PLAN FY 21/22

	Category	Appropriation	Paid	Variance
Phase 1	Strategic Planning, Program Management, and Project Management Activities	$ 4,396,136	$ 4,368,471	$ 27,665
	Independent Verification and Validation Services	$ 3,230,996	$ 2,758,250	$ 472,746
Phase 2	Operations and Maintenance of an Integration Platform and Integration Services for Existing Systems and New Modules	$ 15,351,837	$ 10,228,124	$ 5,123,713
	Implementation of an Enterprise Data Warehouse and Data Governance	$ 21,261,573	$ 16,293,478	$ 4,968,095
Phase 3	Core Fiscal Agent Procurement and Implementation	$ 13,183,905	$ 8,457,122	$ 4,726,783
	Provider Module Procurement and Implementation	$ 6,384,920	$ 1,913,970	$ 4,470,950
	Unified Operations Center	$ 3,283,881	$ 1,820,542	$ 1,463,339
Total		$ 67,093,248	$ 45,839,957	$ 21,253,291

FX SPEND PLAN FY 22/23

	Category	Appropriation	Incurred To-Date	Variance
Phase 1	Strategic Planning, Program Management, and Project Management Activities	$ 9,844,607	$ 4,767,052	$ 5,077,555
	Independent Verification and Validation Services	$ 3,230,996	$ 1,242,138	$ 1,988,858
Phase 2	Operations and Maintenance of an Integration Platform and Integration Services for Existing Systems and New Modules	$ 22,634,878	$ 7,485,734	$ 15,149,144
	Implementation of an Enterprise Data Warehouse and Data Governance	$ 13,894,865	$ 4,784,747	$ 9,110,118
Phase 3	Core Fiscal Agent Procurement and	$ 20,820,487	$ 4,494,556	$ 16,325,931
	Provider Module Procurement and	$ 6,806,312	$ 20,506	$ 6,785,806
	Unified Operations Center	$ 9,678,820	$ 318,850	$ 9,359,970
	Pharmacy Benefits Management Procurement and Implementation	$ 307,496	$ -	$ 307,496
Contingency Funds		$ 24,781,539	$ -	$ 24,781,539
Total		$ 112,000,000	$ 23,113,583	$ 88,886,417

FY 2022-2023 FX PROGRAM FINANCIAL STATUS, PER 11/22 SPEND PLAN

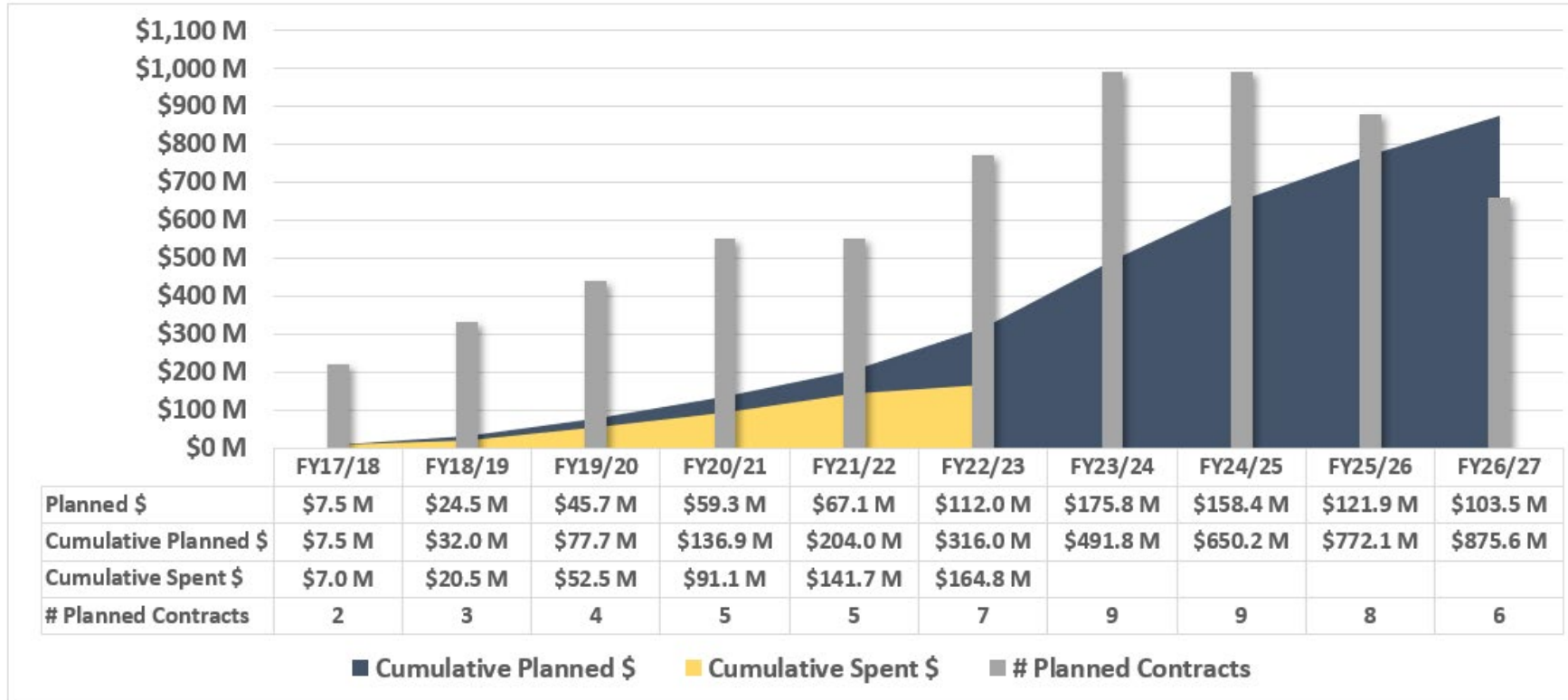| SA 191 Project Component	SA 191 Appropriation	FY22/23 Total Expected Spend	Surplus/ Deficit	Explanation of Variance
Implementation of an Enterprise Data Warehouse and Data Governance	$ 13,894,865.00	$ 16,057,204.27	$ (2,162,339.27)	Original projections were based on estimates provided by the EDW Vendor in Spring 2022 for Module Integration (MI) Services. Revised projections reflect MI needs based on the current roadmap and module integration requirements. In addition, project management and OCM services for EDW DDI shifted from SEAS to the EDW Vendor which were not originally in the scope of the EDW Contract.
Operations and Maintenance of an Integration Platform and Integration Services for Existing Systems and New Modules	$ 22,634,878.00	$ 19,984,680.20	$ 2,650,197.80	Negotiation of module contracts afforded the opportunity to revise module integration projections resulting in better identification of the need applicable to each module. This resulted in a lower projected need within the IS/IP component.
Strategic Planning, Program Management, and Project Management Activities	$ 9,844,607.00	$ 10,109,414.44	$ (264,807.44)	Adjustments needed due to licensing needs/costs.
Independent Verification and Validation Services	$ 3,230,996.00	$ 3,030,555.36	$ 200,440.64	Unobligated funds not projected to be spent.
Core Fiscal Agent Procurement and Implementation	$ 20,820,487.00	$ 29,771,929.21	$ (8,951,442.21)	Original projections were provided prior to contract negotiation/execution - expected spend revised based on detailed budget and deliverable schedule. Also includes updated module integration estimates.
PSM Services Procurement and Implementation	$ 6,806,312.00	$ 370,960.00	$ 6,435,352.00	Procurement delays resulting from the sequential negotiation strategy.
Unified Operations Center Procurement and Implementation	$ 9,678,820.00	$ 16,319,711.98	$ (6,640,891.98)	Original projections were provided prior to contract negotiations/execution - expected spend revised based on detailed budget and deliverable schedule. Also includes updated module integration estimates.
Pharmacy Benefits Management Procurement and Implementation	$ 307,496.00	$ -	$ 307,496.00	Unobligated funds not projected to be spent due to the optional provision in the Core contract to include PBM services.
	$ 87,218,461.00	$ 95,644,455.46	$ (8,425,994.46)	

FY 2022-2023 FX PROGRAM FINANCIAL STATUS, PER 11/22 SPEND PLAN

SA 191 Project Component	SA 191 Appropriation	FY22/23 Total Expected Spend	Surplus/ Deficit	SA 191 Reallocation	SA 196A Funds Requested
Implementation of an Enterprise Data Warehouse and Data Governance	$ 13,894,865.00	$ 16,057,204.27	$ (2,162,339.27)	$ 2,162,339.27	$ -
Operations and Maintenance of an Integration Platform and Integration Services for Existing Systems and New Modules	$ 22,634,878.00	$ 19,984,680.20	$ 2,650,197.80	$ (2,650,197.80)	$ -
Strategic Planning, Program Management, and Project Management Activities	$ 9,844,607.00	$ 10,109,414.44	$ (264,807.44)	$ 264,807.44	$ -
Independent Verification and Validation Services	$ 3,230,996.00	$ 3,030,555.36	$ 200,440.64	$ (200,440.64)	$ -
Core Fiscal Agent Procurement and Implementation	$ 20,820,487.00	$ 29,771,929.21	$ (8,951,442.21)	$ 525,447.75	$ 8,425,994.46
PSM Services Procurement and Implementation	$ 6,806,312.00	$ 370,960.00	$ 6,435,352.00	$ (6,435,352.00)	$ -
Unified Operations Center Procurement and Implementation	$ 9,678,820.00	$ 16,319,711.98	$ (6,640,891.98)	$ 6,640,891.98	$ -
Pharmacy Benefits Management Procurement and Implementation	$ 307,496.00	$ -	$ 307,496.00	$ (307,496.00)	$ -
	$ 87,218,461.00	$ 95,644,455.46	$ (8,425,994.46)	$ -	$ 8,425,994.46

Data as of final November 2022 Spend Plan

FX CUMULATIVE FUNDING ESTIMATES WITH PLANNED CONTRACTS

	FY17/18	FY18/19	FY19/20	FY20/21	FY21/22	FY22/23	FY23/24	FY24/25	FY25/26	FY26/27
Planned $	$7.5 M	$24.5 M	$45.7 M	$59.3 M	$67.1 M	$112.0 M	$175.8 M	$158.4 M	$121.9 M	$103.5 M
Cumulative Planned $	$7.5 M	$32.0 M	$77.7 M	$136.9 M	$204.0 M	$316.0 M	$491.8 M	$650.2 M	$772.1 M	$875.6 M
Cumulative Spent $	$7.0 M	$20.5 M	$52.5 M	$91.1 M	$141.7 M	$164.8 M				
# Planned Contracts	2	3	4	5	5	7	9	9	8	6

■ Cumulative Planned $ ■ Cumulative Spent $ ■ # Planned Contracts

FY 17/18 to FY 22/23 – reflects Appropriated funding
FY 23/24 to FY 26/27 – reflects estimated funding
Cumulative Spent includes payments made through November 30, 2022

FX PLANNED CONTRACTS

Contract	FY17-18	FY18-19	FY19-20	FY20-21	FY21-22	FY22-23	FY23-24	FY24-25	FY25-26	FY26-27
SEAS	X	X	X	X	X	X	X	SEAS	X	
IV&V	X	X	X	X	X	X	X	IV&V	X	
FMMIS Support Fiscal Agent		X	X	X	X	X	X	FMMIS		
ISIP			X	X	X	X	X	ISIP	X	X
EDW				X	X	X	X	EDW	X	X
Provider Management							X	Provider	X	X
Core Systems						X	X	Core	X	X
Unified Operations Center						X	X	UX	OX	X
Pharmacy Benefits Management							X	PX	X	X
TOTAL	**2**	**3**	**4**	**5**	**5**	**7**	**9**	**9**	**8**	**6**

- FY 25/26 is the last year of implementation activity for FX
- The budget forecasts for FY 26/27 (and beyond) include O&M services and enhancements
- Budget forecasts for SEAS and IV&V services end in FY25/26 in conjunction with completion of all Phase III work
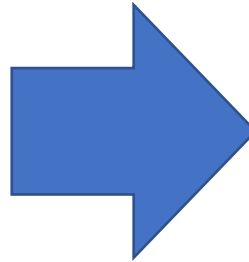
INTERAGENCY SUBJECT MATTER EXPERTS (iSMEs) UPDATE

Alicia Dyer, FX Transformation Team Manager

iSME UPDATE – LEGISLATIVE BUDGET REQUEST

Agency for Persons with Disabilities (APD)	Department of Elderly Affairs (DOEA)
Department of Children and Families (DCF)	Department of Health (DOH)
Department of Juvenile Justice (DJJ)	Florida Healthy Kids (FHK)

Example of efforts to FX interface migration:
- Modify configurations to accept new interfaces
- Support the validation of the new interfaces
- Participate in interface cutover and production validation
- Development effort for the subset of interfaces that are identified for modernization

From this effort, your Agency reported the following anticipated benefits:
- Reducing the number of interfaces
- Optimizing processes
- Near real-time data exchange
- Streamlining effort and increasing use of automation

iSME UPDATE – PEOPLE FIRST DATA INTEROPERABILITY

How will People First integration with FX benefit your Agency and your access to FX?

- Identity Governance and Administration
- Automate manual maintenance of access and manual reassignments of users
- Expedite role assignments and data accessibility

- Streamline user role request process
- Reduce state employee burden to review and approve requests

Agencies FX is Looking to Integrate With

FX MODULE / PROJECT UPDATES

FX Sponsors

INTEGRATION SERVICES/ INTEGRATION PLATFORM (IS/IP) MODULE INTEGRATION (MI)

Luis Diaz, FX Implementation Lead

FX Project Value Statement:

The IS/IP Vendor is responsible for the connection of new modules to the FX Enterprise. However, the Agency must establish a prioritization to interface with the legacy systems. In addition, the Agency will work with other partners to determine what changes are necessary to interface with the new platform and services. This three-year engagement will plan, prioritize, and implement the transition to the FX Enterprise with an emphasis on planning for the SFY 2023-24 budget cycle. The team will leverage the FX Executive Steering Committee to help communicate and prioritize those interfaces outside the Agency.

INTEGRATION IS ESSENTIAL TO <u>ACTUALLY USE</u> MODULES

- Module Integration activities on FX are complex and center around the planning, identification, and development of the green integration services connections depicted on the graphic between the platform and EDW and between the platform and the modular systems

- Connections allow full module implementations or are utilized to transition operations from the existing Fiscal Agent

IS/IP MI
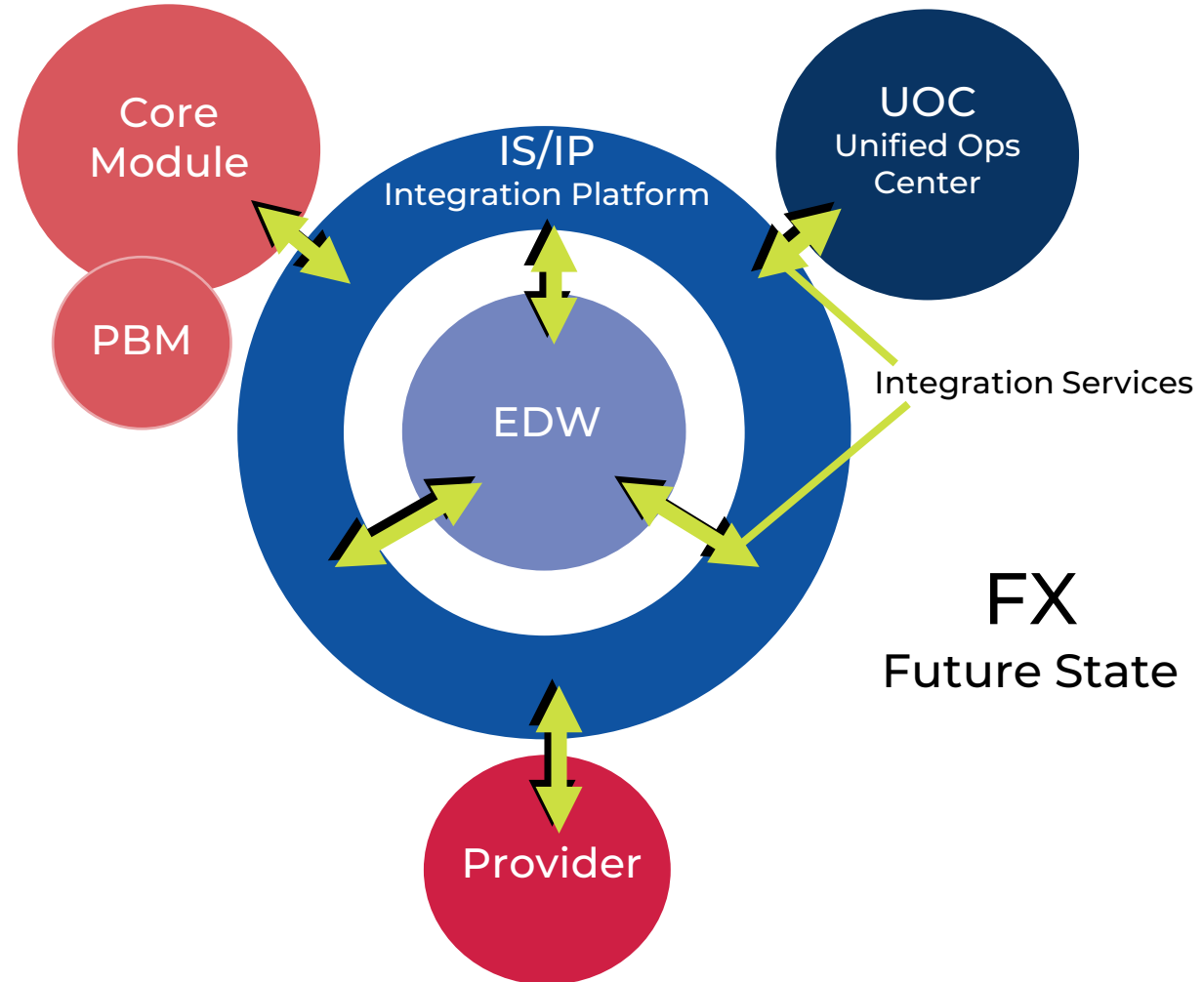
- Update Since Last ESC:
  - Contract Renewal: Executed November 15, 2022 | 3 years | $111,339,490.87
  - Completed Task Order ISIP-0004 which included:
    - Enterprise interface migration strategy, FX Enterprise Portal integration with Enterprise Data Warehouse application, Enterprise MPI/MOI Strategy, and Federated Identity Services and Access Management Services for APD, DOH CMS, DCF, and DOEA.
- Current Status:
  - Providing integration planning and technical services to support the UOC Vendor, FX Enterprise Portal Go-Live with EDW, and the transition of legacy services
  - Creating Integrated Master Project Schedule, which includes MI tasks and cross-module dependencies for the Agency, SEAS, IS/IP, EDW, UOC, and FMMIS transition activities
  - Coordinating with partner agencies on the People First data initiative and upcoming interface migration activities
  - Conducting the initiation and planning and requirements phases for the UOC Project.
- Upcoming:
  - Conduct the design and development of additional interfaces utilized with future modules
  - Design additional integrations and functionality of the FX Enterprise Portal, Identity and Access Management approach, and Master Data Management solution

CENTERS FOR MEDICARE & MEDICAID SERVICES (CMS) INTEROPERABILITY PATIENT ACCESS RULE IMPLEMENTATION (CPARI)

Scott Ward, Project Sponsor

FX Project Value Statement:

CPARI

- ## Update Since Last ESC:
  - Completed design aligned with CMS Interoperability Fast Healthcare Interoperability Resources (FHIR) file standards for Provider Directory Application Program Interface (API), Patient Access API, and Formulary API
  - Completed successful connection to FX Network (FX Net) for FX Cloud Connectivity

- ## Current Status:
  - Planning end-to-end testing for APIs

- ## Upcoming:
  - Provider Directory API, Patient Access API, and Formulary API are expected to be available for utilization by Summer 2023

ENTERPRISE DATA WAREHOUSE IMPLEMENTATION (EDWI)

Nikole Helvey, Project Sponsor

FX Project Value Statement:
To implement an enterprise data management platform aligned with the Agency's FX vision for data and analytics, thereby enabling people and systems within and outside the Agency to operate with the same information to accelerate and improve service delivery.

EDWI

- ## Update Since Last ESC:
  - Finalized design and continued final development of Enterprise Reporting and Analytic Data Stores, including Data Marts and Reporting/Analytic Tools

- ## Current Status:
  - Conducting User Acceptance Testing in 3 phases:
    - Phase 1: Reporting Data Store, Enterprise Data Warehouse Portal and User Roles, Document Management
    - Phase 2: Analytical Data Store (ADS), Information Governance Catalog (IGC), 508 Compliance, and the following Data Marts: Health Events, Finance, Provider, Recipient, Patient Focused Episodes, MARS, SURS
    - Phase 3: EDW Reports and Dashboards

- ## Upcoming:
  - User Adoption and Training
    - Centers for Medicaid and Medicare (CMS) Certification Operational Readiness Review (ORR)
    - People, Process, Technology Deployment Readiness Targeted
    - Go-Live for Spring 2023

UNIFIED OPERATIONS CENTER IMPLEMENTATION (UOCI)

Dietra Cole, Project Sponsor

FX Project Value Statement:

To create a procurement document to describe the business needs for a customer focused, efficient, and cost-effective Unified Operations Center (UOC). The effort includes defining business and technical requirements, defining UOC workforce transformation requirements, procurement documentation, Design, Development, and Implementation (DDI) readiness, and conducting the procurement of a technology and services DDI Vendor for the Agency.

UOCI

- Update Since Last ESC:
  - Contract: Awarded in June to Automated Health Systems (AHS) | Executed October 13, 2022 | 7 years | $150,988,485
  - Onboarding activities and UOC project kickoff meeting conducted on November 9, 2022

- Current Status:
  - Requirements Review and Elaboration sessions in progress

- Upcoming:
  - Integrated Business Processes and Joint Application Design sessions

UOCI – HIGH-LEVEL ROADMAP
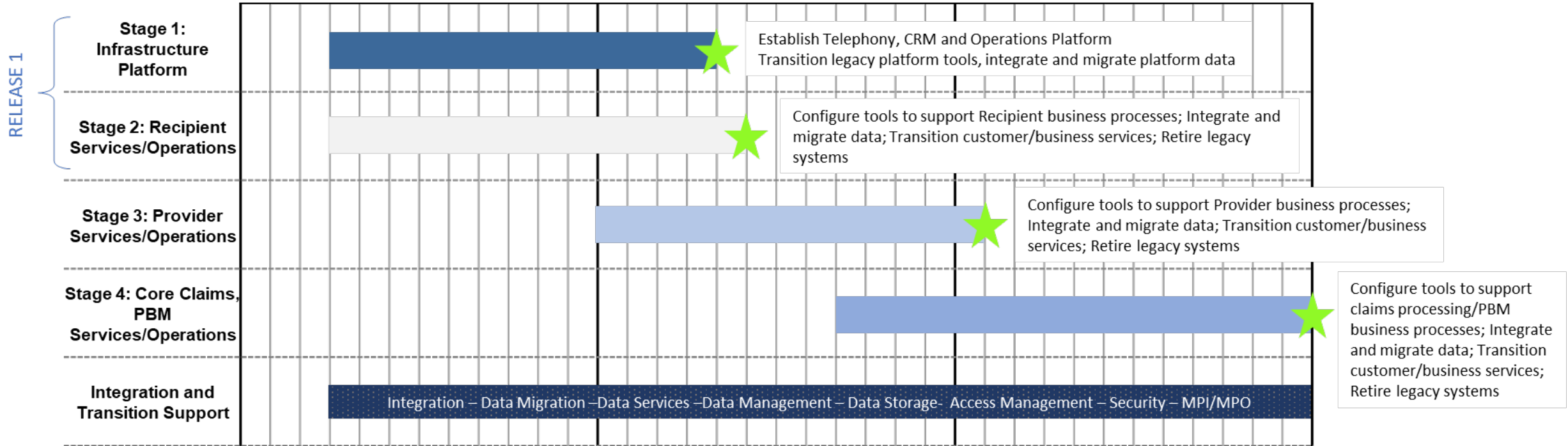
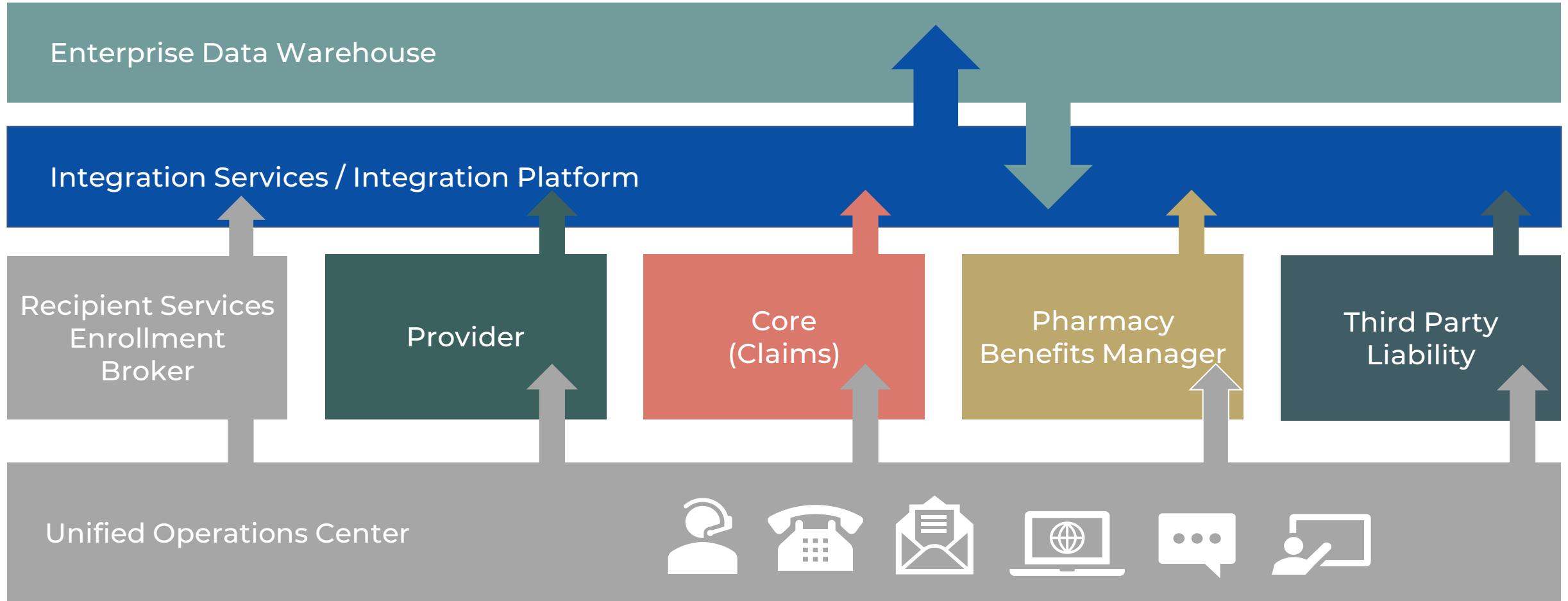# FX FOCUS: UNIFIED OPERATIONS CENTER (UOC)

Derek O. Jackson, Account Executive

Eng Tan, Vice President of Information Technology

Automated Health Systems

FX MODULES & SERVICE LAYERS

Enterprise Data Warehouse

Integration Services / Integration Platform

Recipient Services Enrollment Broker

Provider

Core (Claims)

Pharmacy Benefits Manager

Third Party Liability

Unified Operations Center
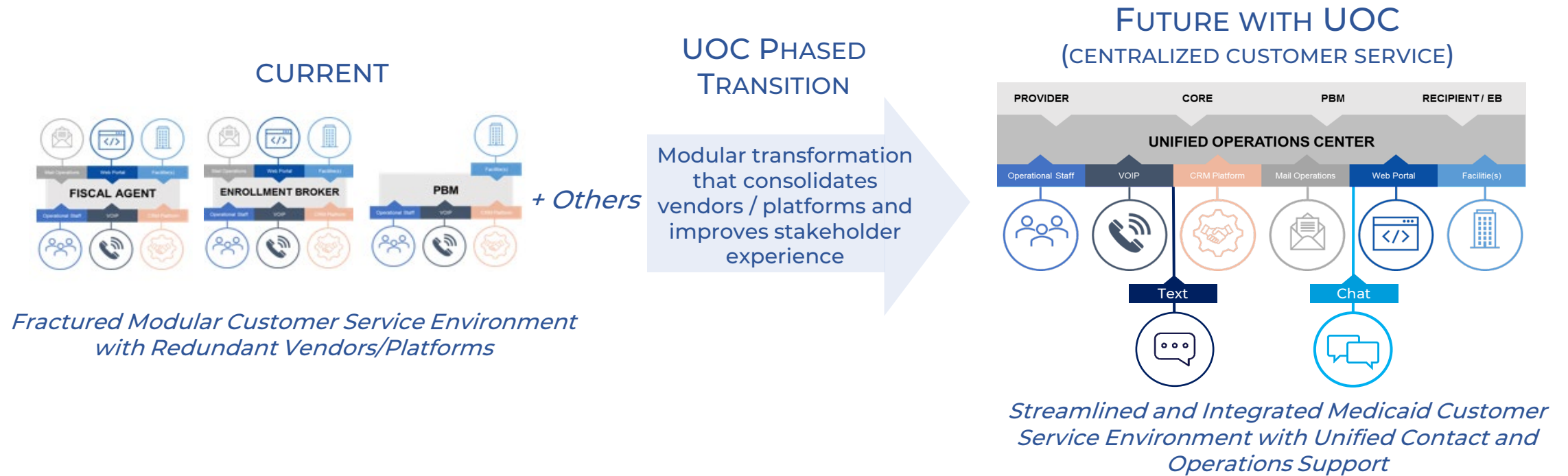
FX UOC TRANSFORMATION

Centralized communications and business operations support solution that consolidates existing customer service operations to enable more efficient and effective service delivery for customers

CURRENT

UOC PHASED TRANSITION

FUTURE WITH UOC
(CENTRALIZED CUSTOMER SERVICE)

+ Others

Modular transformation that consolidates vendors / platforms and improves stakeholder experience

Fractured Modular Customer Service Environment with Redundant Vendors/Platforms

Streamlined and Integrated Medicaid Customer Service Environment with Unified Contact and Operations Support

TRANSFORMING THE MEDICAID ENTERPRISE

Health and Human Services (HHS) Ecosystem

APD Cares — CONNECTING YOU TO THE COMMUNITY
- Provider Information
- DS Waiver Claims
- Prior Authorization
- EQ Health Interface

FLORIDA DEPARTMENT OF CHILDREN AND FAMILIES — MyFLFamilies.com
- Recipient Data and ID Card
- Medicare Eligible /SSA
- TPL
- Child in Care

Healthy Kids — A FLORIDA KIDCARE PARTNER
- MediKids Enrollment
- Medicaid Match
- Federal HUB Medicaid Coverage
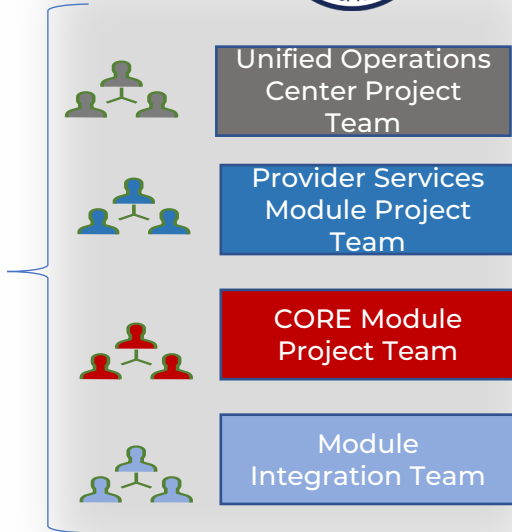- CHIP Expenditure
- MediKids Premium Transfer

Florida HEALTH
- Provider Licensing
- Healthy Start
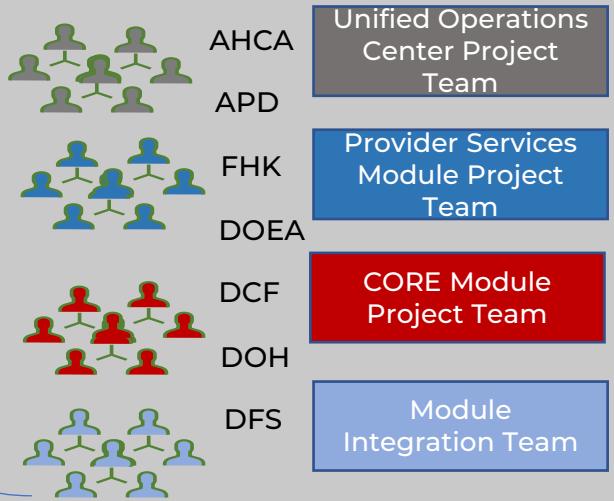- Immunization Registry
- Vital Statistics
- Early Steps

Department of ELDER AFFAIRS — STATE OF FLORIDA
- Monthly Active Enrollments
- Monthly Capitation
- Shared Recipients

CHIEF FINANCIAL OFFICER — Jimmy Patronis
- Financial Information

Agency for Health Care Administration — State of Florida

- Unified Operations Center Project Team
- Provider Services Module Project Team
- CORE Module Project Team
- Module Integration Team

FX Ecosystem

AHCA
APD
FHK
DOEA
DCF
DOH
DFS

- Unified Operations Center Project Team
- Provider Services Module Project Team
- CORE Module Project Team
- Module Integration Team

- Integrated Provider and Recipient Experiences across agencies
- Improve inter-agency business operations
- Architect future state vision together
- Aligned interagency modernization efforts

FX — FLORIDA HEALTH CARE CONNECTIONS

CURRENT CONTACT CENTER/ OPERATION PAIN POINTS

Operation of FMMIS and other agency systems and operational activities are fragmented - including multiple contact centers, programmatic services vendors, and supporting software platforms
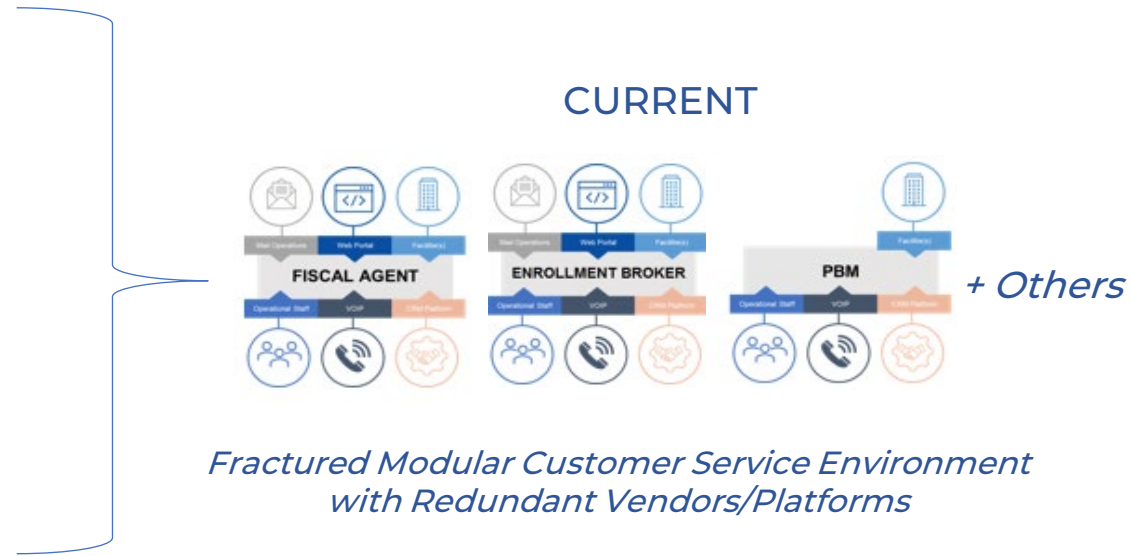
No unified record of Agency communications between platforms resulting in a siloed and confusing user experience

Multi-vendor/platform environments create redundant costs and an inefficient staffing model

CURRENT STATE
7 Contact Centers, 3 Vendors + AHCA
3 CRM Platforms
4 Telecom Systems
6 Websites/Portals
4 Mail Rooms

CURRENT

FISCAL AGENT   ENROLLMENT BROKER   PBM   *+ Others*

Fractured Modular Customer Service Environment with Redundant Vendors/Platforms

UOC MODULE SCOPE ADDRESSING CURRENT CHALLENGES

UOC: customer management infrastructure, and the operational services staffing, to support inbound and outbound communications between the Agency and its stakeholders across the breadth of FX streamlining functionality that currently exists across several systems (Claims, Provider, Recipient, Pharmacy Benefit Manager – PBM, Enrollment Broker)

Implemented in phases to realize benefits quickly

Allows for a more flexible staffing model where UOC services vendor staff, specialized business area module staff (ex. clinical pharmacist call reps for PBM), and Agency staff can all utilize the same platform for different call types - as calls are escalated up agent tiers, the unified platform will allow for warmer hand-offs between agents and result in a dramatically improved stakeholder experience

Cross-training Agency and UOC services staff on different call types will reduce the overall number of agents and could bring more agent positions in-house at the Agency (further reducing costs)
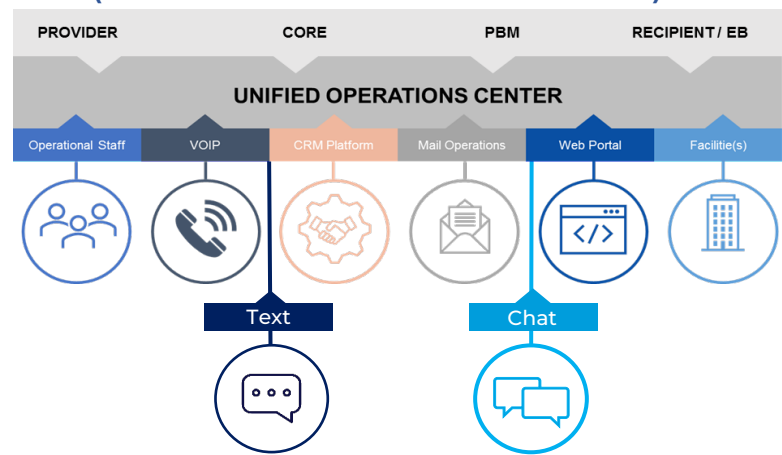
UOC PHASED TRANSITION

Modular transformation that consolidates vendors / platforms and improves stakeholder experience

FUTURE WITH UOC
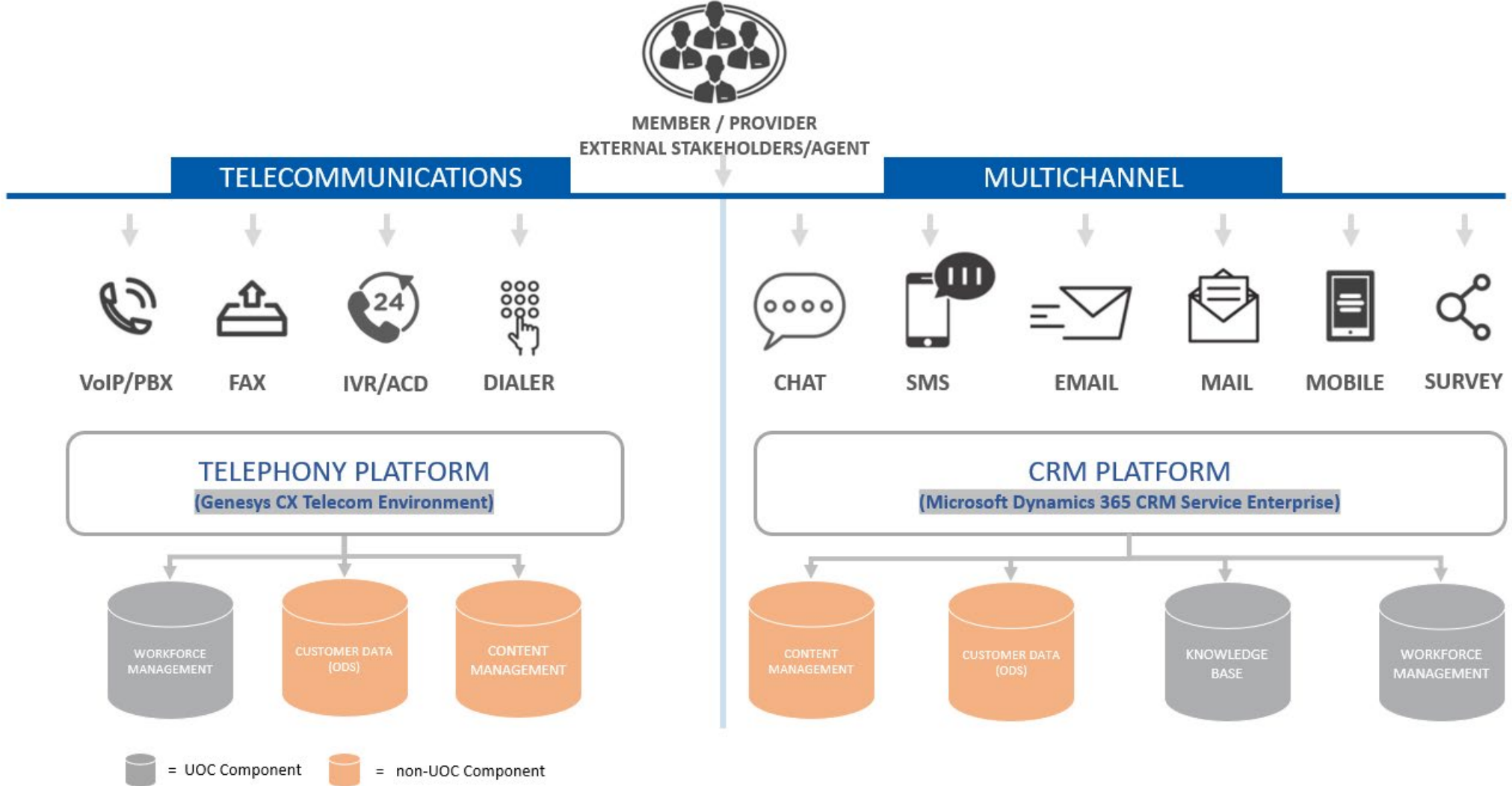### (CENTRALIZED CUSTOMER SERVICE)

PROVIDER | CORE | PBM | RECIPIENT / EB

UNIFIED OPERATIONS CENTER

Operational Staff | VOIP | CRM Platform | Mail Operations | Web Portal | Facilitie(s)

Text | Chat

Streamlined and Integrated Medicaid Customer Service Environment with Unified Contact and Operations Support

WITH UOC
1 Operations Center, + AHCA
1 CRM Platform
1 Telecom System
1 Website/Portal +Embedded Apps
1 Mail Room

UOC CUSTOMER EXPERIENCE

MEMBER / PROVIDER
EXTERNAL STAKEHOLDERS/AGENT

TELECOMMUNICATIONS

VoIP/PBX   FAX   IVR/ACD   DIALER

TELEPHONY PLATFORM
(Genesys CX Telecom Environment)

WORKFORCE MANAGEMENT   CUSTOMER DATA (ODS)   CONTENT MANAGEMENT

MULTICHANNEL

CHAT   SMS   EMAIL   MAIL   MOBILE   SURVEY

CRM PLATFORM
(Microsoft Dynamics 365 CRM Service Enterprise)

CONTENT MANAGEMENT   CUSTOMER DATA (ODS)   KNOWLEDGE BASE   WORKFORCE MANAGEMENT

= UOC Component   = non-UOC Component

CUSTOMER SUPPORT TIERS

Work Task Examples

- Escalated Constituent Issues
- SMMC Retroactive Enrollment

- Claims Adjudication Explanation
- Technical/Clinical Questions
- Assistance for Billing Agents
- Policy & Procedure Research
- Complaint Processing
- Medicaid Fair Hearing Support
- Encounter Technical Support (excluding EDI)
- File Maintenance (change, update, data record)
- Claims Processing Exception Resolution
- Live Transfers of Escalated Calls w/Callbacks

- General Medicaid Inquiries
- Member Eligibility
- Password Resets
- Facility Licensure Status Inquiries
- General Background Screening Inquiries
- Provider Support –claims questions
- Provider Eligibility
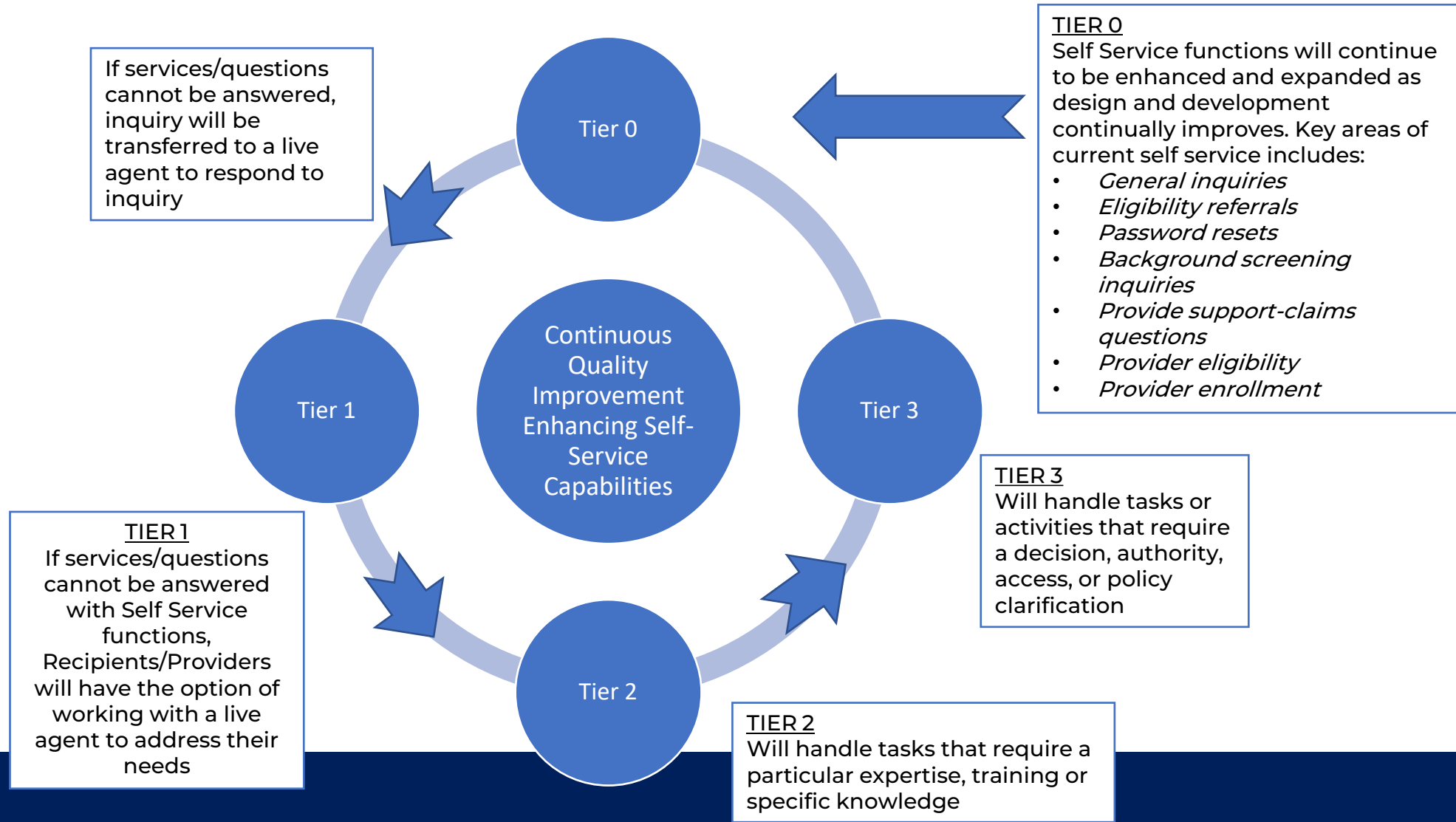- Provider Enrollment
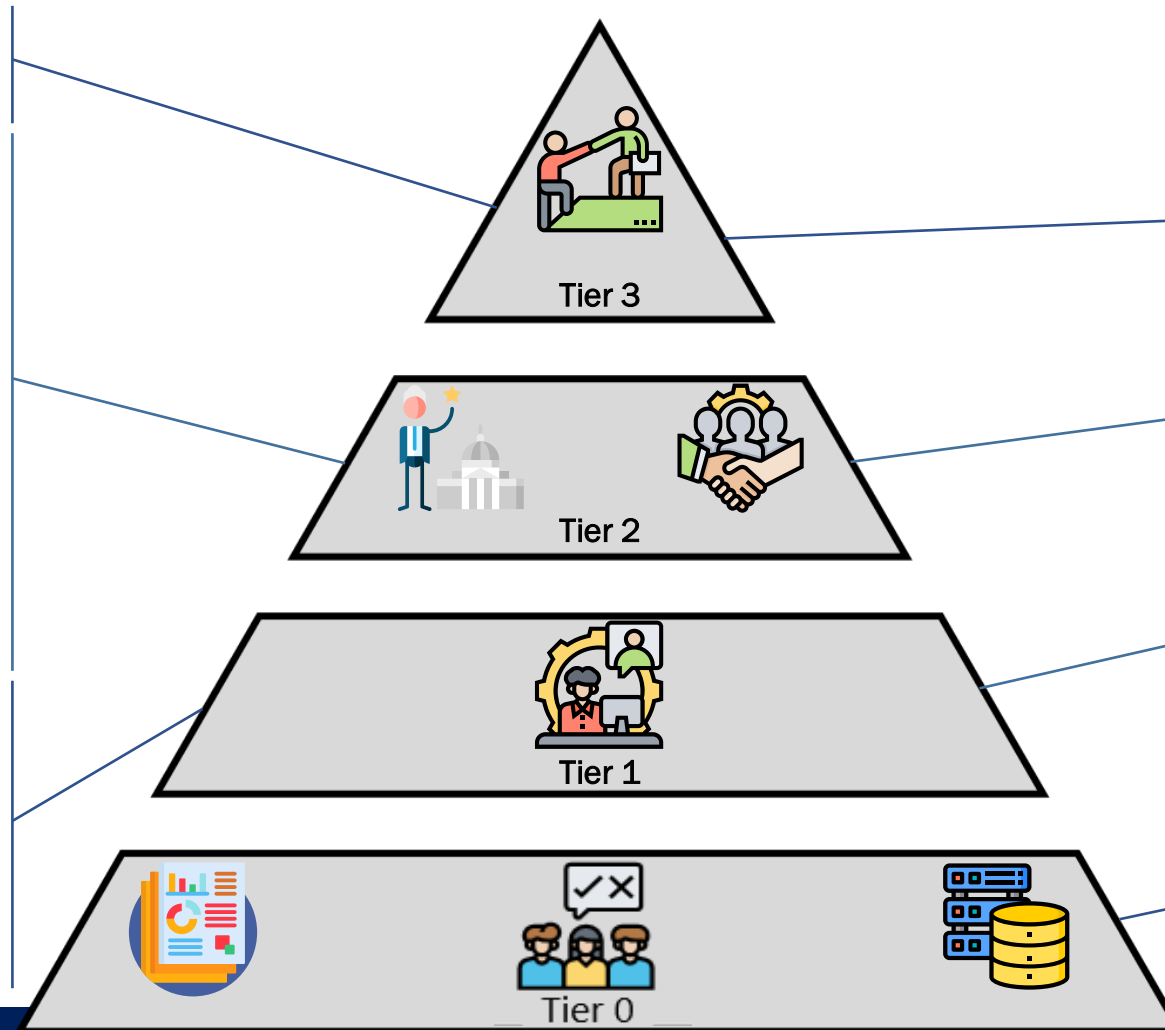
Tier Definitions

Tier Three Definition
Tasks that require a decision, authority, access, or policy clarification for response or resolution.

Tier Two Definition
Tasks that require a particular expertise, training or specific knowledge

Tier One Definition
If services/questions cannot be answered with Self Service functions, Recipients/Providers will have the option of working with a live agent to address their needs

Tier Zero Definition
Self Service functions will continue to be enhanced and expanded as design and development continually improves

Tier 3

Tier 2

Tier 1

Tier 0

CONTINUOUS QUALITY IMPROVEMENT

If services/questions cannot be answered, inquiry will be transferred to a live agent to respond to inquiry

Tier 0

Tier 1

Continuous Quality Improvement Enhancing Self-Service Capabilities

Tier 3

Tier 2

TIER 0
Self Service functions will continue to be enhanced and expanded as design and development continually improves. Key areas of current self service includes:
- *General inquiries*
- *Eligibility referrals*
- *Password resets*
- *Background screening inquiries*
- *Provide support-claims questions*
- *Provider eligibility*
- *Provider enrollment*

TIER 3
Will handle tasks or activities that require a decision, authority, access, or policy clarification

TIER 1
If services/questions cannot be answered with Self Service functions, Recipients/Providers will have the option of working with a live agent to address their needs

TIER 2
Will handle tasks that require a particular expertise, training or specific knowledge

UOC DEMO

https://contentmanagement.mypurecloud.com/document-viewer/#/1/yIs2Ia3vlrdsbls7pyx4cexwue

FX IV&V ASSESSMENT

Kurt Hartmann, FX IV&V Project Director

Independent Verification &Validation (IV&V)

IV&V ASSESSMENT: FX PROGRAM

- Despite the budget challenges, the Agency has brought the shortfall closed to the appropriations bill line items

- Program responsibilities transitioning to the Agency is progressing

- The Agency has procured additional technical and PM resources to cover the additional responsibilities

- At the project level, Agency's SMEs are at risk of becoming constrained due to competing demands from a multi-vendor program

- The FX Governance framework continues to support the needs of a maturing multi-vendor program

- OCM practices enhancement continues with the release of FX OCM standards and processes

IV&V ASSESSMENT: DASHBOARD

Project	Highlight
Enterprise Data Warehouse	• Overall, EDWI is 87% complete with a finish Variance of 14 days. • The project is currently in the execution phase which is 90% complete with a 23-day finish variance from planned dates. • The project's testing phase is 78% complete with a 22-day finish variance from planned dates. • EDWI OCM Training and DSS Transition are being evaluated. A draft Task Order is being reviewed and evaluated by the Agency to address a change in training methods and how to onboard end users.

IV&V ASSESSMENT: DASHBOARD

Project	Highlight
Module Integration	• IS/IP Task Order 0006 for development of MI Integrated Master Program Schedule is in progress and on track for completion on January 30, 2023.

CMSI Patient Access Rule	• The CPARI Project is 78% complete and on schedule.
	
	• The project is in the execution phase which is 77% complete.
	
	• The project team has completed development of:
	
	    • Various Application Programming Interfaces
	
	    • The security configuration for the Web Application Firewall

Unified Operations Center	• The UOC Implementation Project kickoff was held on November 9, 2022. • The Project Management Plan is under Agency review. • The project's schedule has been returned for remediation and corrections. • Requirements elaboration sessions began on November 30, 2022.

IV&V – New Requirements as of 7/1/2022

- Simultaneous submission of <u>all paid deliverables</u>
  - *New:* Governor's Office of Policy and Budget, the chair of the Senate Committee on Appropriations, the chair of the House of Representatives Appropriations Committee, and the Executive Steering Committee members
- Assist/Assess the Agency procurement and Task Order <u>planning</u> and <u>development</u>
  - Review all FX procurement documents to include but not limited to ITN/RFP/RFQs, task orders, amendments, procurement planning and strategy, APD and funding approval, and solicitation alignment
- Assist/Assess the Agency budget <u>planning</u> and <u>development</u> and status reporting
  - Review budget requests and reporting that is submitted to the legislature
  - Review monthly and quarterly reporting that is submitted to the legislature

- To accomplish this and meet the new requirements,
  - The Agency initiates the IV&V assessment
  - IV&V reviews all draft procurement, budget, and Agency work plan documents
    - Provide comments and observations prior to the Agency finalizing these documents
  - IV&V performs an assessment of final versions of these document types
    - Procurement Documents – Create and submit a T-2a FX Task Order Initial Assessment deliverable
    - Budget/Work Plan Documents – Create and submit an Artifact Review Affidavit
  - IV&V incorporates budget and procurement assessment observations in the IV&V FX Program Monthly Status Report

Deliverable	Focus	Submit Date	Approval Date	Outcome
T-1 FX Program Monthly Report (Jul)	FX Program, Portfolio, Modules	8/9/22	9/9/22	Program, portfolio, and modules are meeting expectations
T-1 FX Program Monthly Report (Aug)	FX Program, Portfolio, Modules	9/12/22	10/5/22	Program, portfolio, and modules are meeting expectations
T-1 FX Program Monthly Report (Sep)	FX Program, Portfolio, Modules	10/11/22	10/25/22	Program, portfolio, and modules are meeting expectations
T-1 FX Program Monthly Report (Oct)	FX Program, Portfolio, Modules	11/9/2022	TBD	Program, portfolio, and modules are meeting expectations
I-17 FX Program Schedule Report	Program schedule	7/29/22	10/10/22	Schedule dates are improving but does not support displacement of the current fiscal agent by December 2024
I-8 FX MES Certification Plan Report	P-4 MES Certification Management Plan	7/28/22	9/1/22	Plan adheres to CMS expectations. Provided some minor observations to improve accuracy for SMC
T-2a Task Order Initial Assessment 1	CPARI ISIP TO-5 and Amendment 1	10/3/22	10/28/22	Clear transfer of specific project management services from the SEAS Vendor to the IS/IP Vendor
T-2a Task Order Initial Assessment 2	CPARI – EDW TO-2	10/3/22	10/28/22	Clear transfer of specific project management services from the SEAS Vendor to the EDW Vendor
Artifact Review Affidavit	AHCA FY22-23, Q1 OWP	8/23/22	9/6/22	Final document was clear and concise and met scope and expectations
Artifact Review Affidavit	AHCA FY22-23, Q2 OWP	11/1/2022	TBD	Final document was clear and concise and met scope and expectations
Artifact Review Affidavit	AHCA FY 22-23, Spend Plan (Aug)	10/6/22	10/20/22	Final document identified and discussed funding shortfalls for several modules. These will occur prior to the end of the SFY
Artifact Review Affidavit	AHCA Schedule IV-B	10/7/22	10/21/22	Accurate portrayal of the current/planned future status of FX Program based on the information available

Follow-up from June ESC (Staffing)

- IV&V met with Arkansas to discuss willingness to collaborate with Florida
- They agreed they would share the info with the Florida and/or Agency CIO
- Introduced the Florida CIO to the Arkansas Agency CIO

- Steps Arkansas took to resolve staffing issue
  - Executed a scope change with Vendor to evaluate program/project staffing levels
  - Vendor assessed:
    - Agency project staffing-levels compared to other successful projects
    - Agency salary structure for assigned Project personnel compared to industry averages
    - Agency job descriptions for projects
  - Vendor provided information to be used in a Legislative request and assisted with the request creation
  - Agency and Vendor met with Legislative committee to present issue and recommendations
  - Results:
    - Legislators approved an increase in salary structure for Project Managers
    - Agency was able to hire 4 individuals to manage their projects as State Employees instead of contractors

UPCOMING ACTIVITIES & CLOSING REMARKS

Simone Marstiller, Secretary & FX Executive Sponsor

NEXT FX ESC MEETING

Dates*	Discussion or Review/Approval Items*
TBD: Late January/February 2023	• FX Program Updates • Budget • Roadmap • Procurement • FX Focus

Dates and items may be subject to change.

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APPENDIX

IS/IP O&M PERFORMANCE METRICS – September & October

There are eight (8) performance metrics that are identified as part of MED205.

Key Updates
- Completed Oracle 19c Database Home upgrade for 6 databases.
- Renewed floridafx.net wildcard certificates.
- Cutover completed for Agency UAT Test & EDW connectivity to FX IS/IP via FX Net.
- Completed Jenkins upgrade to latest LTS version.
- Launched new FX IS/IP RFC tool for Module Change Board approval process.
- Applied Linux and Middleware security patches.

PM-1 — Level 1 (Critical and High) Incident Tickets
The Vendor shall submit a Monthly Performance Standards Report Card which lists the incidents tickets by category and shows the incidents which were completed on time and which ones were not completed within the agreed upon timeframe.

PM-4 — Application and System Availability
The Vendor shall submit a Monthly Performance Standards Report Card which shows the amount of total time the ESB system was unavailable and the calculated percent of availability time for the month.

PM-5 — Staffing Levels
The Vendor shall submit a Monthly Performance Standards Report Card which shows the number of agreed upon staff and the number of vacant positions. Staffing level is calculated by dividing the total active staff by the number of agreed upon staff for the month.

PM-6 — Production Reports
The Vendor shall submit a Monthly Performance Standards Report Card which shows the total number of production reports scheduled and the number of reports delivered or available as scheduled. This metric is calculated by dividing the number of reports delivered or accessible on time each month by the total number reports scheduled for the month.

PM-8 — Performance Report
The Vendor shall submit a Monthly Performance Report which shows the agreed to performance metrics. The Financial Consequences for failure to provide the report timely or in a manner acceptable to the Agency shall be $500.00 a day for each business day the report is not received or acceptable.

PM-2 — Enterprise Service Bus End-to-End Response Time
The Vendor shall submit a Monthly Performance Standards Report Card which shows the number of ESB transactions, the average response time per day and the number of ESB transactions each month which are more than 1.000 second.

PM-3 — Enterprise Service Bus Transaction Errors
The Vendor shall submit a Monthly Performance Standards Report Card which shows the number of ESB transactions and the number of ESB transactions errors each calendar day, with a calculation for each calendar day to show the daily error rate.

PM-7 — Master Data Management Performance
The Vendor shall submit a Monthly Performance Standards Report Card which shows MDM transactions, the average transaction time each calendar day and the number of MDM linkage updates each month greater than two (2.000) minutes and number of daily linkage average retrieval times greater than 0.400 seconds.

Legend:
- Performance Metrics met.
- Performance Metrics not currently active.
- Performance Metrics not met.